



USDA TURKEY MARKET NEWS REPORT

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Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET AT-A-GLANCE

DOMESTIC MARKET HIGHLIGHTS

The undertone on 8-16 lb. hens and 16-24 lb. toms was steady to cautious. Trading was moderate in the East, light in the Central and Western regions. Demand tapered as most holiday demand had been met. Weekly weighted averages for current week trading trended slightly lower in the East and Central regions compared to previous week. Compared to a year ago, hens were slightly lower; toms were higher in the East and slightly lower in the Central region. Western region weekly weighted averages on hens were higher and toms unchanged compared to the previous week, both were lower than the same week in 2001. Demand was slow to moderate on parts, fairly light on further processing items.

EXPORT MARKET HIGHLIGHTS

Trading was moderate on tom v-type wings and tom drums, light on mechanically separated turkey and thigh meat. Demand lessened to Mexico due to the upcoming holidays, and to Asia due to the Chinese New Year. Supplies of thigh meat were fully adequate, tom drums and tom v-type wings moved into better balance.



WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **DECEMBER 12, 2002**

	CURRENT SHIPMENTS 2/				FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	65-72.5	65-72.5	67.53	150	-	-	-	-	-
CENTRAL REGION 4/	66-72	68	68.00	10	-	-	-	-	-
WESTERN REGION 5/	68-72	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	60-64	63-64	63.50	160	-	-	-	-	-
CENTRAL REGION 4/	60-63	60	60.00	30	-	-	-	-	-
WESTERN REGION 5/	59-62	-	-	-	-	-	-	-	-

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **DECEMBER 13, 2002**

	CURRENT SHIPMENTS 2/				FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	65-72	65-69	66.87	600	-	-	-	-	-
CENTRAL REGION 4/	65-72	65-68	66.50	160	-	-	-	-	-
WESTERN REGION 5/	68-72	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	59-64	59-61	59.46	260	-	-	-	-	-
CENTRAL REGION 4/	59-63	59	59.00	80	-	-	-	-	-
WESTERN REGION 5/	59-62	61	61.00	10	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days.

3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

WEIGHTED AVERAGE PRICES FOR WHOLE YOUNG TURKEYS, FROZEN CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS)

WEEK OF DEC 13, 2002	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO
8-16 LB HENS			
EASTERN REGION	67.00	69.56	68.00
CENTRAL REGION	66.59	69.01	69.00
WESTERN REGION	70.00**	68.00	72.05
16-24 LB TOMS			
EASTERN REGION	61.32	63.00	58.00
CENTRAL REGION	59.27	61.96	60.00
WESTERN REGION	61.00	61.00	62.22

**BASED ON OFFERS

**SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED TURKEY,
DELIVERED TO RETAILERS**

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	99-107
FRESH TURKEYS Y TOMS 14-24#	99-107
FROZEN TURKEYS Y HENS 8-16#	73
FROZEN TURKEYS Y TOMS 14-24#	66
FROZEN TURKEYS Y TOMS 24-28#	68-73

**SAN FRANCISCO PROCESSED TURKEY
DELIVERED TO RESTAURANTS AND INSTITUTIONS**

	<u>RANGE</u>
TURKEYS Y HENS	119-129
TURKEYS Y TOMS UNDER 22#	119-125
TURKEYS Y TOMS 22-24#	105-125
TURKEYS Y TOMS 24-26#	105-129
TURKEYS Y TOMS 26 LBS & OVER	105-129

FRESH TURKEYS WITH TIMERS OR EQUIVALENT

U.S. GRADE A, DELIVERED FIRST RECEIVERS, EASTERN REGION
CENTS PER POUND, WEEK OF 16-DEC-2002

	(8-16#)	(16-24#)		
	HENS	LBS	TOMS	LBS
	PRICE	(000)	PRICE	(000)
SALES (PROMOTIONS INCLUDED)	82.19	720	75.27	520
SALES (PROMOTIONS NOT INCLUDED)	82.19	720	75.27	520
SALES (PROMOTIONS ONLY)				
SALES (PRICE TO BE DETERMINED)				

TURKEY MOVEMENT TREND

(IN THOUSAND POUNDS)

SLAUGHTER-CERTIFIED RTC TURKEYS

NOVEMBER 460,410*
DECEMBER 1-7, 2002 113,012*

To date 2002 4,938,316*
To date 2001 4,934,776*

*PRELIMINARY

NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTS

BY GEOGRAPHICAL AREAS WEEK ENDING 07-Dec-2002
(PRELIMINARY) (RELEASED 12:00 NOON CENTRAL TIME)

	<u>YOUNG TURKEYS</u>		<u>TOTAL TURKEYS</u>	
	PCT	AVG	OLD	AVG
	CHG	LIVE	BANDED	LIVE
-THOUSAND HEAD-	PW	WT	-THOUSAND HEAD-	WT
N EAST	861	11424.16 (A)	869	24.16
SATL	894	9528.27 (A)	902	28.27
N CENT	2,316	4832.08 (A)	2,324	32.08
S CENT	429	13421.56 (A)	437	21.56
WEST	474	13722.26 (A)	482	22.26
U.S. TOTAL	4,974(B)	77 28.18	40 5,014	28.18
TO-DATE				
2002	229,393(B)		640	230,033
TO-DATE				
2001	237,046(B)		559	237,605

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 58,000 for the year 2,631,000; last year to date 2,241,000.

LIVE TURKEYS SLAUGHTERED

W/E 07-Dec-2002

	YOUNG		YOUNG	OLD	TOTAL
	HENS	TOMS	BREEDERS		
	<u>THOUSANDS</u>				
HEAD	2,053	2,863	58	40	5,014
AVG WT	15.77	37.15	24.89	27.71	28.18
LAST WEEK	946	1,845	16	26	2,833
SAME WK YR AGO	2,086	2,790	53	6	4,935
AVG WT	15.56	35.88	26.73	38.42	27.18
TO-DATE/2002	91,187	135,575	2,631	640	230,033
TO-DATE/2001	99,335	135,470	2,241	559	237,605

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NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 12 DECEMBER 2002.

Trade sentiment steady to weak on tom breast meat. Demand seasonally slowing. Some sellers of fresh tom breast meat looking for any buyer interest before they establish offering prices. Offerings of frozen white meat ranged adequate to burdensome as some aggressively try to move inventories by year end. The undertone on frozen 4-8 lb. breasts was steady to barely steady with only a light inquiry noted. Offerings available. Undertone mostly steady on institutional breasts. Some buyers have noted less problems finding desired sizes while others noted some spot tightness on 16-18 lb. sizes. Undertone mixed on frozen thigh meat for export with some sellers able to command premiums while others look for buyer inquiry. Trading centered on a heavy volume of frozen mechanically separated turkey (MST) at 10-11 cents delivered pet foods, a fair volume of tom drums for export, balance light. Fresh wing meat traded at 51 cents delivered domestic close-by and frozen MST -60 days age 13-14 cents delivered export.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		W	98.17	240
BREASTS, 4-8 LBS GRADE A—FRESH 2/	139.00-154.00		153.71	102
BREASTS, 4-8 LBS PLANT GRADE 2/	88.00		88.00	18
DRUMSTICKS, TOM	16.00-20.50		18.40	26
DRUMSTICKS, TOM—FRESH				
DRUMSTICKS, HEN	19.00		19.00	14
WINGS, FULL-CUT, TOM	21.50-22.50		21.68	17
WINGS, FULL-CUT, HEN	21.00		21.00	14
WINGS, V-TYPE, TOM		W	23.00	10
WINGS, V-TYPE, HEN		W	53.69	130
NECKS, TOM	13.50-14.50		13.68	17
NECKS, HEN	13.00		13.00	14
BREASTS, B/S, TOM 3/		T	127.74	46
BREASTS, B/S, TOM—FRESH 3/	153.00		153.00	40
THIGH MEAT		T	53.00	40
THIGH MEAT—FRESH		T	59.42	62
BREAST TRIM MEAT		W	87.00	10
SCAPULA MEAT		W	68.50	120
TENDERLOINS				
DESTRAPPED TENDERS	103.00		103.00	120
DESTRAPPED TENDERS—FRESH	135.00-136.00		135.80	200
WING MEAT WITH SKIN		F	53.00	30
MECHANICALLY SEPARATED 4/		R	16.00	40
MECHANICALLY SEPARATED—FRESH 4/	19.00		19.00	20

EXPORT TRADING

DRUMSTICKS, TOMS	18.50-21.00		19.64	440
WINGS FULL-CUT - TOMS		F	19.00	52
WINGS, V-TYPE, TOM		W	17.57	728
TAILS		W	18.00	80
MECHANICALLY SEPARATED 4/		W	15.68	212
THIGH MEAT - FROZEN	53.00-59.50		57.37	316

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins. 4/ 15-20% fat with skin added.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 13 DECEMBER 2002.

The tom bulk parts undertone on full-cut wings was steady to barely steady, 2-joint wings steady to weak (both domestic and export), and drums steady to instances weak, tails steady. The undertone was at least steady on hen wings, drums mostly steady, and necks barely steady. Domestic bulk parts demand was light to instances fair with some increased activity noted on tom drums and tom 2-joint wings at lower trending price levels. Export demand on tom drums and tom 2-joint wings continued active, balance of parts slow to instances moderate. Tom bulk parts ranged from at least adequate on full-cut wings to burdensome on necks. Some tom 2-joint wing inventories are becoming better balanced, others remain burdensome. Hen bulk parts offerings ranged from light on wings to fully adequate on necks. Trading centered on a moderate volume of tom 2-joint wings and a fair volume of tom drums for export, balance light. For domestic: fresh breast trim 83- 85, plant grade non-basted basted 12-16 lb. breasts 98, plant grade basted 18-20 lb. breasts 115, hearts 26, fresh wing meat 50-51, breast patterned skin 50 cents delivered. For export: frozen MST -90 days age 13, frozen thigh trim with bone fragments 31 cents delivered.

DOMESTIC TRADING	PRICE RANGE	LST CDE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		W	98.17	240	98.17	240
BREASTS, 4-8 LBS GRADE A—FRESH 2/	149.00		149.00	200	150.59	302
BREASTS, 4-8 LBS PLANT GRADE 2/		R	88.00	18	90.56	78
DRUMSTICKS, TOM	17.00-21.00		18.56	180	18.69	220
DRUMSTICKS, TOM—FRESH	20.00-21.00		20.56	36	20.56	36
DRUMSTICKS, HEN		R	19.00	14	19.00	68
WINGS, FULL-CUT, TOM	21.00-23.00		22.00	80	22.36	146
WINGS, FULL-CUT, HEN		R	21.00	14	21.00	68
WINGS, V-TYPE, TOM	18.00-21.00		19.11	360	19.22	370
WINGS, V-TYPE, HEN		W	53.69	130	53.69	130
NECKS, TOM	14.00-15.00		14.69	64	13.86	238
NECKS, HEN		R	13.00	14	13.00	68
BREASTS, B/S, TOM 3/		T	127.74	46	127.74	46
BREASTS, B/S, TOM—FRESH 3/	147.00-153.00		151.62	78	152.08	118
THIGH MEAT		T	53.00	40	53.00	40
THIGH MEAT—FRESH	58.00		58.00	40	58.86	102
BREAST TRIM MEAT		W	87.00	10	87.00	10
SCAPULA MEAT	67.00-73.00		69.73	220	70.19	420
TENDERLOINS						
DESTRAPPED TENDERS	101.00-103.00		101.67	120	101.31	490
DESTRAPPED TENDERS—FRESH		R	135.80	200	135.80	200
WING MEAT WITH SKIN	49.50		49.50	40	49.50	40
MECHANICALLY SEPARATED 4/	16.00		16.00	40	16.00	40
MECHANICALLY SEPARATED—FRESH 4/	16.00-17.00		16.67	60	16.56	550
EXPORT TRADING						
DRUMSTICKS, TOMS	19.00-20.00		19.36	440	19.57	1,012
WINGS FULL-CUT - TOMS		F	19.00	52		
WINGS, V-TYPE, TOM	17.00		17.00	520	17.33	1,248
TAILS		W	18.00	80	18.33	120
MECHANICALLY SEPARATED 4/	15.00		15.00	80	15.57	572
THIGH MEAT - FROZEN	54.00		54.00	20	56.16	456

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3/ Boneless and skinless without tenderloins. 4/ 15-20% fat with skin added.